



TEAM RUNBOOK • 20-DAY SETUP

Email Outreach Engine: launch runbook

From domain health to signed clients, step by step. Every step has an owner, a due date, the tools to use, how to do it and the evidence to keep.

71

steps in 14 stages

11

milestones

20 days

setup, 17 Sep to 6
Oct 2026

1,008

cold emails a day by
2 Nov

How to use this runbook

Working rules

1. Work the steps in date order. The 20-day plan shows what is due each day.
2. Before starting, read why the step matters and what done looks like.
3. Keep the evidence listed on each step and upload it to the Milestone Tracker or Launch Control.
4. A step is complete only when its evidence is uploaded and Management has approved it.
5. Never paste passwords or secrets into screenshots, chat or notes.

Owners

Management	12 steps
Microsoft 365 admin	8 steps
DNS owner	13 steps
Ops lead	25 steps
Data operator	8 steps
Marketing ops	9 steps
Reply desk	3 steps
Meeting owner	7 steps
Solution lead	4 steps
Claude	12 steps

Stages

STAGE	NAME	WHEN	STEPS
0	Kickoff and access Everyone knows their role and has the logins they need.	Setup day 1 · 17 Sep	3
1	Diagnose the main domain Prove exactly why mail lands in spam, with evidence.	Setup days 1 to 2 · 17 to 18 Sep	7
2	Authenticate abilityglobal.io SPF, DKIM and DMARC all pass and align with the domain.	Setup days 1 to 5 · 17 to 21 Sep	4
3	Harden tenant and transport No compromised mailbox or spoofed DNS can damage the domain.	Setup days 5 to 8 · 21 to 24 Sep	6
4	Enforce and perfect 10 out of 10 health score, DMARC at reject.	Setup days 14 to 20 · 30 Sep to 6 Oct	5
5	Bulk lane for opt-in email Newsletters and announcements go out at volume without touching the main mailboxes.	Setup days 14 to 20 · 30 Sep to 6 Oct	5

STAGE	NAME	WHEN	STEPS
6	Cold outreach infrastructure 22 domains and 44 inboxes set up, authenticated and warming.	Setup days 2 to 4 · 18 to 20 Sep	6
7	Data engine 8,000 verified, scored, researched leads ready before launch.	Setup days 2 to 19 · 18 Sep to 5 Oct	7
8	Messaging Human, varied copy that passes placement tests.	Setup days 6 to 16 · 22 Sep to 2 Oct	5
9	Automation, CRM and meetings setup Every reply routed, drafted and tracked automatically.	Setup days 6 to 16 · 22 Sep to 2 Oct	5
10	Launch and ramp Reach 1,008 emails a day with every KPI green.	After setup · 12 Oct to 2 Nov	5
11	Daily operations The engine runs itself; people handle judgment.	Every business day from 12 Oct	4
12	Meetings to clients From yes to a scoped proposal in 48 hours.	Per meeting, from 12 Oct	6
13	Review and scale Keep improving, then grow safely.	Weekly and monthly	3

02 The 20-day setup plan

52 of 71 steps sit inside the setup window. Warmup starts on day 4 and keeps running after setup. Cold sending starts only after 21 days of warmup.

DAY	DATE	STEPS DUE
Day 1	Thu, 17 Sept	0.1 Assign owners for every role 0.2 Collect admin access 0.3 Freeze bulk and cold sending from abilityglobal.io 1.1 Run header tests 1.2 Check blocklists and domain health 1.3 Verify Google Postmaster Tools 2.1 Enable DKIM in Microsoft 365
Day 2	Fri, 18 Sept	1.4 Review Microsoft Defender 1.5 Build the sender inventory 1.6 Confirm tenant ownership 1.7 Audit signatures and content 2.2 Set up DMARC reporting 6.1 Buy 22 sending domains 7.1 Write the segment definitions
Day 3	Sat, 19 Sept	6.2 Set up DNS for every domain 6.3 Create 44 inboxes
Day 4	Sun, 20 Sept	2.3 Authorise every other sender 6.4 Finish each mailbox profile 6.5 Connect to PlusVibe and start warmup 6.6 Pass gate G1 on every domain
Day 5	Mon, 21 Sept	2.4 Verify authentication 3.1 Lock down identity 7.2 Connect Apollo to Claude
Day 6	Tue, 22 Sept	3.2 Set outbound spam policy 3.3 Disable SMTP AUTH except service accounts 5.1 Choose the bulk email platform 8.1 Build the answer library
Day 7	Wed, 23 Sept	3.4 Publish MTA-STS and TLS-RPT 3.5 Enable DNSSEC 7.3 Set up signal collection
Day 8	Thu, 24 Sept	3.6 Fix website trust signals 5.2 Authenticate news.abilityglobal.io 7.5 Build the global suppression list
Day 9	Fri, 25 Sept	7.4 Score and research with Claude 9.3 Set up booking links
Day 10	Sat, 26 Sept	5.3 Move product mail to notify.abilityglobal.io 9.1 Configure campaign settings
Day 11	Sun, 27 Sept	7.6 Verify and route every lead 8.2 Write launch campaigns
Day 12	Mon, 28 Sept	8.3 Run the copy quality gate 9.2 Build the reply flow
Day 13	Tue, 29 Sept	8.4 Set signatures and footers 9.4 Install Claude skills and schedules
Day 14	Wed, 30 Sept	4.1 Review DMARC reports weekly 4.2 Move SPF to hard fail 5.4 Prepare consented lists
Day 15	Thu, 1 Oct	8.5 Pass gate G3 placement
Day 16	Fri, 2 Oct	9.5 Dry run the reply desk
Day 17	Sat, 3 Oct	Buffer and warmup day
Day 18	Sun, 4 Oct	10.1 Pass gate G2 on all inboxes
Day 19	Mon, 5 Oct	4.4 Run the perfect-health test matrix 7.7 Fill the lead bank
Day 20	Tue, 6 Oct	4.3 Move DMARC to reject

Management signs off each milestone when every step in it has evidence and is approved.

MILESTONE	DUE	PHASE	STEPS	SIGN-OFF
M1 Access and freeze in place Owners, logins and a stop on risky sending.	17 Sept	Setup	0.1, 0.2, 0.3	
M2 Cold infrastructure live and warming 22 domains and 44 inboxes pass G1 and start warming on day 4.	20 Sept	Setup	6.1, 6.2, 6.3, 6.4, 6.5, 6.6	
M3 Main domain authenticated DKIM live, reports flowing, every sender authorised.	21 Sept	Setup	1.1, 1.2, 1.3, 1.4, 1.5, 1.6, 1.7, 2.1, 2.2, 2.3, 2.4	
M4 Tenant and transport hardened MFA, limits, MTA-STTS testing, DNSSEC and web trust.	24 Sept	Setup	3.1, 3.2, 3.3, 3.4, 3.5, 3.6	
M5 Bulk lane configured Platform, news and notify subdomains, consented lists.	30 Sept	Setup	5.1, 5.2, 5.3, 5.4	
M6 Data, messaging and automation ready Segments, approved copy, reply flow, booking and Claude skills working.	2 Oct	Setup	7.1, 7.2, 7.3, 7.4, 7.5, 7.6, 8.1, 8.2, 8.3, 8.4, 8.5, 9.1, 9.2, 9.3, 9.4, 9.5	
M7 Setup complete and signed off Perfect health test matrix, DMARC reject, 8,000 leads, G2 placement passed.	6 Oct	Setup	4.1, 4.2, 4.3, 4.4, 7.7, 10.1	
M8 First cold emails live Inboxes past 21 days of warmup; 288 a day.	12 Oct	After setup	10.2	
M9 1,008 emails a day Full cold volume with every KPI green.	2 Nov	After setup	10.3, 10.4, 10.5	
M10 Bulk lane at 10,000 a day Opt-in email ramped on its own subdomain.	17 Nov	After setup	5.5	
M11 Operating rhythm and scale Daily ops, meetings to proposals, BIM1, scale decision.	7 Dec	After setup	11.1, 11.2, 11.3, 11.4, 12.1, 12.2, 12.3, 12.4, 12.5, 12.6, 13.1, 13.2, 13.3, 4.5	

The tools chosen for the Email Outreach Engine and the steps where each one is used.

Apollo Lead generation

Find ICP contacts and enrich them through the Claude connector.

Steps 7.2, 11.2

Claude + Apify Research and scrapers

Collect buying signals, score leads, write personal lines, copy and reply drafts.

Steps 7.3, 7.4, 8.2

MillionVerifier Recipient verification

Bulk check every lead before it enters a campaign.

Steps 7.6, 11.2

NeverBounce Recipient verification

Second check on catch-all and unknown results.

Steps 7.6, 5.4

Mailscale Inboxes and test runs

Native inboxes on the 22 sending domains, plus marketing-style test runs.

Steps 6.3, 8.5

PlusVibe Sending engine

Warmup, inbox rotation, spintax, campaigns, unibox, AI replies and casual placement tests.

Steps 6.5, 9.1, 10.1 to 10.5

mail-tester Deliverability score

10/10 check for the main domain and every sending inbox.

Steps 2.4, 6.6, 4.4

Claude AI and automation layer

Skills, daily health reports, evidence checks, meeting briefs, scopes and follow-ups.

Steps 9.4, 11.1, 12.2 to 12.6

Suggested service providers

Recommended vendor for each need, with alternatives and indicative 2026 prices. Confirm current prices with each vendor before buying.

NEED	SUGGESTED	ALTERNATIVES	INDICATIVE PRICE	STEPS
Sending domains At-cost renewals, DNS already on Cloudflare, easy DNSSEC. Keep abilityglobal.io at GoDaddy.	Cloudflare Registrar	Porkbun, Namecheap	About \$10 to \$12 a year per .com at cost	6.1, 6.2
Cold inboxes (Microsoft and Google) Real Microsoft 365 and Google Workspace tenants with bulk setup. Avoid shared-IP look-alike Microsoft inboxes for bank and CISO buyers.	Mailscale (chosen)	Maildoso, Zapmail, InboxKit, Primeforge	Quote per inbox; market range about \$2.50 to \$4.50 per Microsoft inbox a month	6.3, 6.4
Sending, warmup and unibox Inbox rotation, spintax, warmup, AI replies, placement tests and an MCP server for Claude.	PlusVibe (chosen)	Instantly, Smartlead	From about \$37 a month; warmup included	6.5, 9.1, 10.1 to 10.5
Lead data ICP search and enrichment, connected to Claude.	Apollo (chosen)	Clay, Lusha	Paid seat plans; check current Apollo pricing	7.2, 11.2
Research and scraping Buying signals, hiring posts, tech stack and news for personal first lines.	Claude + Apify (chosen)	PhantomBuster	Apify usage-based, free tier then paid plans	7.3, 7.4
Email verification Lowest cost per check with solid accuracy for the full list.	MillionVerifier (chosen)	ZeroBounce, Bouncer	About \$37 per 10,000 checks	7.6, 11.2
Second verification pass Re-checks catch-all and unknown results before they enter a campaign.	NeverBounce (chosen)	Scrubby for catch-all domains	About \$80 per 10,000 checks	7.6, 5.4
DMARC monitoring Readable aggregate reports needed before moving DMARC to reject.	EasyDMARC	dmarcian, DMARCLY, Postmark DMARC digests (free)	Free tier; paid from about \$18 to \$36 a month for 2 domains	2.2, 4.1, 4.3
Deliverability score and placement 10/10 score per inbox plus seed placement across Gmail and Outlook.	mail-tester, PlusVibe and Mailscale tests (chosen)	GlockApps	mail-tester low-cost credits; GlockApps free 3 tests then from \$59 a month	2.4, 6.6, 8.5
Reputation dashboards Domain and spam rate signals straight from Gmail and Outlook.	Google Postmaster Tools	Microsoft SNDS	Free	1.3, 11.1
Opt-in bulk email lane Separate news subdomain for newsletters, never mixed with cold sending.	Brevo	Amazon SES, Mailchimp	Brevo tiered plans; SES about \$0.10 per 1,000 emails	5.1 to 5.5

NEED	SUGGESTED	ALTERNATIVES	INDICATIVE PRICE	STEPS
CRM and pipeline Replies, meetings and deals in one place, linked to Claude.	HubSpot Starter	Pipedrive	Per-seat monthly plans	9.2, 12.6
Automation PlusVibe to Claude to Slack to CRM reply routing.	n8n	Make, Zapier	Self-host free or cloud plans	9.2
Meeting booking Round-robin booking links for US and GCC hours.	Calendly	Cal.com	Free tier; paid per seat	9.3, 12.1
Team alerts Hot replies, daily health report and auto-pause alerts.	Slack	Microsoft Teams	Existing workspace	9.2, 11.1

0

Kickoff and access

Setup day 1 · 17 Sep
3 steps

Everyone knows their role and has the logins they need.



0.1 Assign owners for every role

Management

Due 17 Sept

Setup

Tools: This runbook

Without a named owner, shared tasks stall. One person per role makes every step accountable.

1. Name one person per role: Microsoft 365 admin, DNS owner, ops lead, data operator, marketing ops, 2 reply desk members, meeting owners, solution leads.
2. Share this runbook link with all of them.

DONE WHEN

Every role has a named owner.

EVIDENCE TO KEEP

Screenshot of the owners list (sheet or message) showing a name against every role.

Done by _____

Date _____

Approved by Management _____



0.2 Collect admin access

Ops lead

Due 17 Sept

Setup

Tools: Microsoft 365, Cloudflare, GoDaddy, Google account

Most steps need admin rights. Finding access gaps now avoids days of waiting later.

1. Confirm Global or Exchange admin access to Microsoft 365 and Defender.
2. Confirm edit access to the abilityglobal.io zone in Cloudflare.
3. Confirm login to the GoDaddy registrar account.
4. Create or pick a Google account for Postmaster Tools.
5. Store all credentials in the company password manager, never in chat.

DONE WHEN

Owners can log in to all four systems.

EVIDENCE TO KEEP

Screenshots of the Microsoft 365 admin center home, the Cloudflare DNS page for abilityglobal.io, and the GoDaddy domain page (hide passwords).

Done by _____

Date _____

Approved by Management _____



0.3 Freeze bulk and cold sending from abilityglobal.io

Management

Ops lead

Due 17 Sept

Setup

Tools: Team announcement

Any mass or cold email from the main domain keeps damaging its reputation while we repair it.

1. Announce: no newsletters, mass mails, BCC blasts or cold emails from any @abilityglobal.io mailbox.
2. Pause any tool or CRM sequence that sends as the domain.

DONE WHEN

Written confirmation from every team that sends email.

EVIDENCE TO KEEP

Screenshot of the team announcement and confirmation that tools sending as the domain are paused.

Done by _____

Date _____

Approved by Management _____

1

Diagnose the main domain

Prove exactly why mail lands in spam, with evidence.

Setup days 1 to 2 · 17 to 18 Sep
7 steps



1.1 Run header tests

Microsoft 365 admin

Due 17 Sept

Setup

Tools: Gmail and Outlook.com test inboxes

Headers are the receiving server's own verdict. They show exactly which check fails and why mail is junked.

1. Send a plain email from a normal mailbox to a personal Gmail and an Outlook.com address.
2. Open the original message (Gmail: Show original; Outlook: View message source).
3. Record spf, dkim, dmarc results and the SCL score. Screenshot them.

DONE WHEN

Screenshots saved to the shared folder.

EVIDENCE TO KEEP

Screenshots of the full Authentication-Results header from Gmail and from Outlook.com.

Done by

Date

Approved by Management



1.2 Check blocklists and domain health

Ops lead

Due 17 Sept

Setup

Tools: MXToolbox, Spamhaus, mail-tester

A blocklist listing can override every other fix. We must know before we invest in the rest.

1. Run MXToolbox Domain Health and Blacklist Check for abilityglobal.io.
2. Run the Spamhaus domain lookup.
3. Record every error, warning and listing.

DONE WHEN

Results logged with any listings flagged.

EVIDENCE TO KEEP

Screenshots of MXToolbox Domain Health, MXToolbox Blacklist results and the Spamhaus lookup.

Done by

Date

Approved by Management



1.3 Verify Google Postmaster Tools

DNS owner

Due 17 Sept

Setup

Tools: Postmaster Tools, Cloudflare

Postmaster Tools is Google's only direct view of our spam rate and compliance. It becomes our scoreboard.

1. Add abilityglobal.io in Postmaster Tools.
2. Add the TXT verification record in Cloudflare.
3. Confirm verified. Data appears once Gmail sees enough volume.

DONE WHEN

Domain shows as verified.

EVIDENCE TO KEEP

Screenshot of Postmaster Tools showing abilityglobal.io as verified.

Done by _____

Date _____

Approved by Management _____



1.4 Review Microsoft Defender

Microsoft 365 admin

Due 18 Sept

Setup

Tools: security.microsoft.com, Exchange admin center

A compromised or restricted mailbox silently sends spam and drags down the whole domain.

1. Check Restricted users for any blocked senders.
2. Check outbound spam alerts for the last 30 days.
3. Run a message trace: external volume per mailbox for 30 days. Flag any unusual spike.

DONE WHEN

Findings noted, any suspicious mailbox secured.

EVIDENCE TO KEEP

Screenshots of the Restricted users page and the message trace summary.

Done by _____

Date _____

Approved by Management _____



1.5 Build the sender inventory

Ops lead

Due 18 Sept

Setup

Tools: Shared sheet

Every system sending as the domain must be authorised, or it fails DMARC and gets rejected once we enforce.

1. List every system that sends as @abilityglobal.io: website forms, CRM, Novara HR, OrviQ, invoicing, HR tools, scanners.
2. For each: sending service, volume, and whether it can sign DKIM.

DONE WHEN

Complete list approved by the ops lead.

EVIDENCE TO KEEP

Screenshot of the completed sender inventory sheet.

Done by _____

Date _____

Approved by Management _____



1.6 Confirm tenant ownership

Microsoft 365 admin

Due 18 Sept

Setup

Tools: Microsoft 365 admin center

If GoDaddy manages the tenant we may not control DKIM and security settings. This decides the path.

1. Check whether Microsoft 365 is billed through GoDaddy.
2. Confirm full access to Defender and Exchange admin centers.
3. If access is limited, raise a decision to move to a direct Microsoft tenant.

DONE WHEN

Ownership and access level documented.

EVIDENCE TO KEEP

Screenshot of Microsoft 365 billing or subscription page and the Defender home page loading.

Done by _____

Date _____

Approved by Management _____



1.7 Audit signatures and content

Marketing ops

Due 18 Sept

Setup

Tools: Outlook signatures

Images, trackers and shortened links in signatures are classic spam signals on every email we send.

1. Check every signature for images, banners, tracking pixels and shortened links.
2. Replace with a plain text signature: name, title, Ability, phone, website.

DONE WHEN

All signatures plain text.

EVIDENCE TO KEEP

Screenshot of a new plain text signature in Outlook.

Done by _____

Date _____

Approved by Management _____

2

Authenticate abilityglobal.io

SPF, DKIM and DMARC all pass and align with the domain.

Setup days 1 to 5 · 17 to 21 Sep
4 steps



2.1 Enable DKIM in Microsoft 365

Microsoft 365 admin

DNS owner

Due 17 Sept

Setup

Tools: Defender portal, Cloudflare

DKIM is the missing check. Without it our mail cannot align for DMARC and inbox providers treat it as low trust.

1. Defender: Email and collaboration > Policies and rules > Threat policies > Email authentication settings > DKIM.
2. Select abilityglobal.io, toggle on and copy the two CNAME values.
3. In Cloudflare add selector1._domainkey and selector2._domainkey as CNAME, DNS only (grey cloud), TTL 3600.
4. Return to Defender and enable signing. Status must read Signing DKIM signatures.

DONE WHEN

Status is Signing; keys are 2048-bit.

EVIDENCE TO KEEP

Screenshot of Defender DKIM page showing "Signing DKIM signatures for this domain" and the two CNAME records in Cloudflare.

Done by _____

Date _____

Approved by Management _____



2.2 Set up DMARC reporting

DNS owner

Due 18 Sept

Setup

Tools: DMARC monitor (EasyDMARC, dmarcian or Postmark)

Reports show every server sending as us, what passes, what fails, and any spoofing. We cannot fix what we cannot see.

1. Create a DMARC monitor account and get its report address.
2. Replace the _dmarc record: v=DMARC1; p=quarantine; rua=mailto:<monitor>; adkim=r; aspf=r; fo=1

DONE WHEN

First aggregate report received within 48 hours.

EVIDENCE TO KEEP

Screenshot of the new _dmarc record in Cloudflare and the DMARC monitor dashboard with the domain added.

Done by _____

Date _____

Approved by Management _____



2.3 Authorise every other sender

DNS owner

Ops lead

Due 20 Sept

Setup

Tools: Sender inventory, Cloudflare

Unauthorised senders fail silently today and will be rejected when DMARC moves to reject.

1. For each system in the inventory, add its SPF include and DKIM records, or move it to a subdomain such as notify.abilityglobal.io.
2. Keep SPF under 10 DNS lookups.

DONE WHEN

Every inventory row marked authenticated.

EVIDENCE TO KEEP

Screenshot of the SPF record and the updated inventory sheet with every row marked authenticated.

Done by _____

Date _____

Approved by Management _____



2.4 Verify authentication

Microsoft 365 admin

Due 21 Sept

Setup

Tools: mail-tester.com, header tests

Proof that the fixes work in real mailboxes, not just in DNS.

1. Repeat the header tests from step 1.1.
2. Send to mail-tester.com.

DONE WHEN

dkim=pass header.d=abilityglobal.io,
dmarc=pass, mail-tester 10/10.

EVIDENCE TO KEEP

Screenshots of headers showing dkim=pass
header.d=abilityglobal.io and dmarc=pass, plus
the mail-tester 10/10 result.

Done by _____

Date _____

Approved by Management _____

3

Harden tenant and transport

No compromised mailbox or spoofed DNS can damage the domain.

Setup days 5 to 8 · 21 to 24 Sep
6 steps



3.1 Lock down identity

Microsoft 365 admin

Due 21 Sept

Setup

Tools: Entra ID

Stolen passwords are the most common way domains start sending spam overnight.

1. Enforce MFA for every user.
2. Block legacy authentication.

DONE WHEN

100% of users on MFA.

EVIDENCE TO KEEP

Screenshot of Entra ID showing MFA enforced (Conditional Access or security defaults) and legacy auth blocked.

Done by

Date

Approved by Management



3.2 Set outbound spam policy

Microsoft 365 admin

Due 22 Sept

Setup

Tools: Defender outbound spam policy

Limits cap the damage if an account is compromised; external forwarding leaks mail and breaks authentication.

1. Set per-user external limits (for example 500 per hour, 1,000 per day).
2. Notify admins when a user is restricted.
3. Set automatic forwarding to Off.

DONE WHEN

Policy saved and alert tested.

EVIDENCE TO KEEP

Screenshot of the outbound spam policy with limits, alert and forwarding set to Off.

Done by

Date

Approved by Management



3.3 Disable SMTP AUTH except service accounts

Microsoft 365 admin

Due 22 Sept

Setup

Tools: Exchange admin center

SMTP AUTH is a common attack path for sending spam with stolen credentials.

1. Turn off SMTP AUTH at tenant level.
2. Enable only for named service accounts that need it.

DONE WHEN

Only listed accounts can use SMTP AUTH.

EVIDENCE TO KEEP

Screenshot of the tenant SMTP AUTH setting disabled and the list of allowed service accounts.

Done by _____

Date _____

Approved by Management _____



3.4 Publish MTA-STS and TLS-RPT

DNS owner

Due 23 Sept

Setup

Tools: Cloudflare, policy host

Forces encrypted delivery to us and is a trust signal enterprise and bank gateways check.

1. Host the MTA-STS policy at mta-sts.abilityglobal.io in mode: testing.
2. Add _mta-sts TXT v=STSV1; id=<date>.
3. Add _smtp._tls TXT v=TLSRPTv1; rua=mailto:<monitor>.
4. After 10 to 14 clean days of TLS reports (by 4 Oct) switch the policy to mode: enforce.

DONE WHEN

Records valid; enforce set by 4 Oct.

EVIDENCE TO KEEP

Screenshot of the _mta-sts and _smtp._tls records and an MTA-STS validator result.

Done by _____

Date _____

Approved by Management _____



3.5 Enable DNSSEC

DNS owner

Due 23 Sept

Setup

Tools: Cloudflare, GoDaddy

Prevents attackers from forging our DNS answers, including mail records.

1. Enable DNSSEC in Cloudflare and copy the DS record.
2. Add the DS record at GoDaddy.

DONE WHEN

DNSSEC shows active in Cloudflare.

EVIDENCE TO KEEP

Screenshot of Cloudflare DNSSEC showing Active.

Done by _____

Date _____

Approved by Management _____



3.6 Fix website trust signals

DNS owner

Marketing ops

Due 24 Sept

Setup

Tools: Cloudflare, website

Receivers and prospects both check the website. An exposed server and no address reduce trust.

1. Proxy the apex record through Cloudflare like www, HTTPS everywhere.
2. Add business address, privacy notice and terms to the site footer.

DONE WHEN

Both hostnames proxied; footer live.

EVIDENCE TO KEEP

Screenshots of Cloudflare DNS with apex and www proxied, and the website footer with address and privacy link.

Done by

Date

Approved by Management

4

Enforce and perfect

10 out of 10 health score, DMARC at reject.

Setup days 14 to 20 · 30 Sep to 6 Oct
5 steps☐ 4.1 Review DMARC reports weekly

Ops lead Claude Due 30 Sept Setup

Tools: DMARC monitor

Moving to reject without clean reports would block our own legitimate mail.

1. Check aligned pass rate by source.
2. Fix any legitimate source that fails.

DONE WHEN

99% or more aligned for 2 weeks running.

EVIDENCE TO KEEP

Screenshot of the DMARC monitor showing aligned pass rate by source for the week.

Done by _____

Date _____

Approved by Management _____

☐ 4.2 Move SPF to hard fail

DNS owner Due 30 Sept Setup

Tools: Cloudflare

Hard fail tells receivers any unlisted server is an impostor.

1. Change ~all to -all once every sender is authorised.

DONE WHEN

SPF ends in -all, no new failures.

EVIDENCE TO KEEP

Screenshot of the SPF record ending in -all.

Done by _____

Date _____

Approved by Management _____

☐ 4.3 Move DMARC to reject

DNS owner Management Due 6 Oct Setup

Tools: Cloudflare

Reject is the top DMARC grade. It stops spoofing and is required for BIMl and perfect health.

1. Management approves once reports show 14+ days of clean alignment.
2. Set v=DMARC1; p=reject; sp=reject; rua=mailto:<monitor>; adkim=r; aspf=r; fo=1
3. If a legitimate source fails, drop back to quarantine for a week, fix, return.

DONE WHEN

p=reject live with no legitimate failures.

EVIDENCE TO KEEP

Screenshot of the _dmarc record with p=reject and the DMARC monitor showing no legitimate failures.

Done by _____

Date _____

Approved by Management _____



4.4 Run the perfect-health test matrix

Ops lead

Due 5 Oct

Setup

Tools: mail-tester, MXToolbox, Postmaster, DMARC monitor, internet.nl

One consistent test proves the domain is at 10/10 before we rely on it.

1. mail-tester 10/10; MXToolbox 0 errors, 0 warnings; 0 blocklists.
2. Postmaster spam rate under 0.1%; DMARC 99%+ aligned; TLS-RPT 0 failures; internet.nl mail test all green.

DONE WHEN

Every check green. Domain declared perfect.

EVIDENCE TO KEEP

Screenshots of mail-tester 10/10, MXToolbox 0 errors, blocklists clean, Postmaster spam rate and the internet.nl mail test.

Done by _____

Date _____

Approved by Management _____



4.5 Add BIMi logo

DNS owner

Marketing ops

Due 20 Oct

After setup

Tools: SVG Tiny logo, VMC or CMC certificate

The Ability logo in the inbox raises trust and open rates with prospects.

1. Create SVG Tiny PS version of the Ability logo.
2. Buy a VMC or CMC certificate.
3. Publish default._bimi TXT.

DONE WHEN

Logo shows in Gmail.

EVIDENCE TO KEEP

Screenshot of the default._bimi record and a Gmail inbox showing the logo.

Done by _____

Date _____

Approved by Management _____

5

Bulk lane for opt-in email

Newsletters and announcements go out at volume without touching the main mailboxes.

Setup days 14 to 20 · 30 Sep to 6 Oct
5 steps

5.1 Choose the bulk email platform

Marketing ops Management Due 22 Sept Setup

Tools: Brevo, SendGrid, Mailgun, Amazon SES or similar

Microsoft 365 mailboxes are not built for bulk. A dedicated platform protects the main domain.

1. Compare on price at your list size, one-click unsubscribe, custom return-path and API.
2. Management approves.

DONE WHEN

Account opened.

EVIDENCE TO KEEP

Screenshot of the chosen platform account dashboard and the approval note.

Done by

Date

Approved by Management

5.2 Authenticate news.abilityglobal.io

DNS owner Marketing ops Due 24 Sept Setup

Tools: Platform, Cloudflare

A separate authenticated subdomain gives bulk mail its own reputation lane, aligned to our DMARC.

1. Add the subdomain in the platform and publish its DKIM records.
2. Set a custom return-path bounce.news.abilityglobal.io.
3. Set a branded tracking domain or turn tracking off.

DONE WHEN

Platform shows domain fully authenticated.

EVIDENCE TO KEEP

Screenshot of the platform domain authentication page showing all records verified.

Done by

Date

Approved by Management

5.3 Move product mail to notify.abilityglobal.io

Solution lead DNS owner Due 26 Sept Setup

Tools: Transactional sender

Product notifications must not share reputation with people's daily email.

1. Point Novara HR, OrviQ and app notifications at the notify subdomain with its own DKIM.

DONE WHEN

No app mail sends from the root domain.

EVIDENCE TO KEEP

Screenshot of a product notification header showing the notify subdomain with dkim=pass.

Done by

Date

Approved by Management



5.4 Prepare consented lists

Marketing ops

Due 30 Sept

Setup

Tools: CRM, MillionVerifier, NeverBounce

Sending to people who never opted in is the fastest route to spam complaints and legal risk.

1. Import only contacts with a recorded opt-in or an active client relationship.
2. Verify addresses older than 30 days.
3. Enable one-click unsubscribe and sync suppressions to the CRM daily.

DONE WHEN

Clean segmented lists with source and date for each contact.

EVIDENCE TO KEEP

Screenshot of the list import summary with consent source fields and unsubscribe settings enabled.

Done by _____

Date _____

Approved by Management _____



5.5 Ramp bulk volume

Marketing ops

Due 17 Nov

After setup

Tools: Bulk platform, mail-tester, PlusVibe or Mailscale test runs

A sudden jump in volume looks like spam. Gradual growth with engaged contacts builds reputation.

1. Starts after setup (7 Oct). Week 1: 250 a day, week 2: 500, week 3: 1,000, week 4: 2,500, week 5: 5,000, week 6: 10,000.
2. Most engaged contacts first. Step up only when the week passes every KPI.

DONE WHEN

10,000 a day with green dashboard.

EVIDENCE TO KEEP

Screenshot of the platform sending report showing daily volumes and bounce and complaint rates.

Done by _____

Date _____

Approved by Management _____

6

Cold outreach infrastructure

22 domains and 44 inboxes set up, authenticated and warming.

Setup days 2 to 4 · 18 to 20 Sep
6 steps



6.1 Buy 22 sending domains

Ops lead

Management

Due 18 Sept

Setup

Tools: GoDaddy or Cloudflare Registrar

Cold outreach must never risk abilityglobal.io. Separate domains take that risk instead.

1. Shortlist 30 brand-adjacent names (for example abilityteams.com, getability.io).
2. Management approves 22. Buy with auto-renew and privacy on.

DONE WHEN

22 domains owned.

EVIDENCE TO KEEP

Screenshot of the registrar showing the 22 domains with auto-renew on.

Done by

Date

Approved by Management



6.2 Set up DNS for every domain

DNS owner

Claude

Due 19 Sept

Setup

Tools: Cloudflare

New domains without correct SPF, DKIM and DMARC are rejected or junked from the first email.

1. Add each domain to Cloudflare.
2. Publish MX, SPF (-all), DKIM, DMARC p=none with rua.
3. Add a 301 redirect to abilityglobal.io.
4. Claude generates and checks all records from the domain list.

DONE WHEN

Claude check sheet shows every record valid.

EVIDENCE TO KEEP

Screenshot of the Claude record check sheet and a sample domain's Cloudflare DNS page.

Done by

Date

Approved by Management



6.3 Create 44 inboxes

Ops lead

Due 19 Sept

Setup

Tools: Mailscale (recommended inbox provider)

Native Microsoft and Google inboxes land far better with enterprise buyers than cheap shared servers.

1. 12 domains on Microsoft 365, 6 on Google Workspace, 4 reserve.
2. 2 inboxes per domain on real team names.
3. Confirm in writing they are native Microsoft or Google on a tenant dedicated to Ability.

DONE WHEN

44 inboxes log in successfully.

EVIDENCE TO KEEP

Screenshot of the inbox provider dashboard listing all 44 inboxes by domain.

Done by _____

Date _____

Approved by Management _____



6.4 Finish each mailbox profile

Ops lead

Due 20 Sept

Setup

Tools: Each inbox

Complete profiles look like real people, which filters and recipients both reward.

1. Profile photo, plain text signature, time zone.
2. No forwarding rules.

DONE WHEN

All 44 profiles complete.

EVIDENCE TO KEEP

Screenshot of two sample inboxes showing photo and signature.

Done by _____

Date _____

Approved by Management _____



6.5 Connect to PlusVibe and start warmup

Ops lead

Due 20 Sept

Setup

Tools: PlusVibe Business

Warmup builds sending history so new inboxes are trusted before real campaigns start.

1. Connect all inboxes; tag MS, GW or Reserve.
2. Warmup on: start 5 a day, ramp enabled, reply rate 30 to 40%.
3. Microsoft inboxes: enable SMTP AUTH or use OAuth.

DONE WHEN

Warmup running on 44 inboxes.

EVIDENCE TO KEEP

Screenshot of PlusVibe email accounts page showing all inboxes with warmup active and tags.

Done by _____

Date _____

Approved by Management _____



6.6 Pass gate G1 on every domain

Ops lead

Due 20 Sept

Setup

Tools: mail-tester.com

A domain that fails basic tests will burn the campaign that uses it.

1. Send one test from each inbox.

DONE WHEN

Every inbox scores 10/10 (9.5 minimum).

EVIDENCE TO KEEP

Screenshots of mail-tester results (a summary sheet of 44 scores is acceptable).

Done by

Date

Approved by Management

7

Data engine

8,000 verified, scored, researched leads ready before launch.

Setup days 2 to 19 · 18 Sep to 5 Oct
7 steps

☐ 7.1 Write the segment definitions

Management

Solution lead

Due 18 Sept

Setup

Tools: Project doc

Clear segments decide who we email and what we say. Vague targeting produces low replies and complaints.

1. AI and engineering (30%), Cyber and OrviQ (25%), Banking ops (20%), Talent and Novara HR (15%), BizAi (10%).
2. For each: titles, industries, company size, markets, buying signals, offer.

DONE WHEN

Approved segment sheet.

EVIDENCE TO KEEP

Screenshot of the approved segment sheet.

Done by _____

Date _____

Approved by Management _____

☐ 7.2 Connect Apollo to Claude

Data operator

Due 21 Sept

Setup

Tools: Apollo, Claude (Apollo connector)

Pulling leads through the official connector keeps the Apollo account safe and lets Claude automate sourcing.

1. Claude settings > Connectors > Apollo, sign in.
2. Save one search per segment.

DONE WHEN

Claude can pull a test batch of 50.

EVIDENCE TO KEEP

Screenshot of the Apollo connector in Claude and a saved search result.

Done by _____

Date _____

Approved by Management _____



7.3 Set up signal collection

Data operator

Due 23 Sept

Setup

Tools: Claude + Apify scrapers

Buying signals make emails timely and relevant, which is the biggest driver of replies.

1. Configure actors for job posts, news and company websites for target companies.
2. Do not scrape Apollo itself.

DONE WHEN

Signals attach to a test batch.

EVIDENCE TO KEEP

Screenshot of the Apify actor runs and a sample of signals attached to leads.

Done by _____

Date _____

Approved by Management _____



7.4 Score and research with Claude

Claude

Data operator

Due 25 Sept

Setup

Tools: Claude skills, Apify signals, Apollo data

Scoring focuses effort on the best-fit leads; the personal line makes each email clearly human.

1. Score 0 to 100; drop under 55.
2. Over 70: Claude writes a personal first line from the signal.
3. Data operator spot-checks 5% of leads.

DONE WHEN

Scored batch passes spot-check.

EVIDENCE TO KEEP

Screenshot of a scored batch with scores and personal lines, and the spot-check notes.

Done by _____

Date _____

Approved by Management _____



7.5 Build the global suppression list

Data operator

Due 24 Sept

Setup

Tools: CRM, PlusVibe

Emailing a client, a live deal or someone who opted out damages relationships and reputation.

1. Add clients, partners, open deals, the LinkedIn warm list, anyone who unsubscribed.
2. Load into PlusVibe blocklist.

DONE WHEN

Suppression list live in PlusVibe.

EVIDENCE TO KEEP

Screenshot of the PlusVibe blocklist with the suppression list loaded.

Done by _____

Date _____

Approved by Management _____



7.6 Verify and route every lead

Data operator

Due 27 Sept

Setup

Tools: MillionVerifier, NeverBounce

Bounces above 2% quickly damage sending domains. Verification keeps lists clean.

1. MillionVerifier first; ok goes to send.
2. Catch-all or unknown goes to NeverBounce; valid goes to send, still risky goes to the catch-all lane.
3. Drop invalid, disposable and role addresses.
4. Claude tags each lead Microsoft, Google or gateway from the MX record.

DONE WHEN

Bounce under 1% on test sample.

EVIDENCE TO KEEP

Screenshot of MillionVerifier results summary and the NeverBounce re-check summary.

Done by _____

Date _____

Approved by Management _____



7.7 Fill the lead bank

Data operator

Due 5 Oct

Setup

Tools: Shared sheet or CRM

Launching without enough leads forces rushed, lower quality sourcing during the ramp.

1. Reach 8,000 verified leads across the two launch segments and the next two, ready before warmup completes.

DONE WHEN

8,000 leads ready.

EVIDENCE TO KEEP

Screenshot of the lead bank showing the count per segment.

Done by _____

Date _____

Approved by Management _____

8

Messaging

Human, varied copy that passes placement tests.

Setup days 6 to 16 · 22 Sep to 2 Oct
5 steps

8.1 Build the answer library

Solution lead

Marketing ops

Due 22 Sept

Setup

Tools: Project doc

Approved answers keep replies fast, accurate and consistent across the reply desk.

1. Approved answers for pricing ranges, security, compliance, delivery locations, engagement models.

DONE WHEN

Library approved by management.

EVIDENCE TO KEEP

Screenshot of the answer library document.

Done by _____

Date _____

Approved by Management _____



8.2 Write launch campaigns

Marketing ops

Claude

Due 27 Sept

Setup

Tools: Claude, PlusVibe spintax

Varied, relevant, plain text emails are what land in the inbox and get replies.

1. Two launch campaigns: AI engineering (US) and Cyber (UAE).
2. 4 steps each (day 0, 3, 7, 14), 3 to 4 angle variants per step, spintax on greetings, openers and questions.
3. Plain text, 50 to 110 words, no links in step 1, one question.

DONE WHEN

Draft copy for both campaigns.

EVIDENCE TO KEEP

Screenshot of both campaigns in PlusVibe showing all steps and variants.

Done by _____

Date _____

Approved by Management _____



8.3 Run the copy quality gate

Claude

Management

Due 28 Sept

Setup

Tools: Claude, mail-tester

One weak or spammy variant can hurt every inbox that sends it.

1. Check word count, banned words (offshore, outsourcing, cheap), spam words, no em dashes, links.
2. Management reads and approves every variant.

DONE WHEN

All variants approved.

EVIDENCE TO KEEP

Screenshot of the quality gate results and management approval.

Done by _____

Date _____

Approved by Management _____



8.4 Set signatures and footers

Ops lead

Due 29 Sept

Setup

Tools: PlusVibe

A postal address and opt-out are legally required in key markets and build trust.

1. Name, title, Ability, city, office address.
2. Opt-out line: If this isn't relevant, reply "no thanks" and I won't follow up.

DONE WHEN

Signatures set on all inboxes.

EVIDENCE TO KEEP

Screenshot of a sample inbox signature in PlusVibe.

Done by _____

Date _____

Approved by Management _____



8.5 Pass gate G3 placement

Ops lead

Due 1 Oct

Setup

Tools: PlusVibe and Mailscale inbox tests, mail-tester

Placement tests catch copy that filters dislike before real prospects see it.

1. Send each variant with spintax resolved to the seed list using PlusVibe inbox tests.
2. Run a marketing-style test email through PlusVibe or Mailscale as a comparison, and score one send on mail-tester.

DONE WHEN

80% or more inbox; rewrite anything under 70%.

EVIDENCE TO KEEP

Screenshot of the PlusVibe placement test results per variant.

Done by _____

Date _____

Approved by Management _____

9

Automation, CRM and meetings setup

Every reply routed, drafted and tracked automatically.

Setup days 6 to 16 · 22 Sep to 2 Oct
5 steps

9.1 Configure campaign settings

Ops lead Due 26 Sept Setup

Tools: PlusVibe

Human sending rhythms and limits are what keep inboxes out of spam at scale.

1. 28 per inbox maximum, window 08:30 to 16:30 recipient time, weekdays.
2. Random gap 11 to 23 minutes, stop on reply at company level.
3. Open and click tracking off; 3 contacts per company per week.
4. Provider matching: Microsoft recipients to Microsoft pool, Google to Google.

DONE WHEN

Settings screenshot approved by ops lead.

EVIDENCE TO KEEP

Screenshot of the campaign settings pages in PlusVibe.

Done by _____

Date _____

Approved by Management _____

9.2 Build the reply flow

Ops lead Claude Due 28 Sept Setup

Tools: n8n, Claude API, Slack, HubSpot

Fast, accurate replies turn interest into meetings; slow replies lose them.

1. PlusVibe webhook to n8n on every reply.
2. Claude classifies into 8 classes and drafts a reply.
3. Out of office, not interested and unsubscribe are handled automatically.
4. Everything else posts to Slack with Approve and Edit; approved replies send from the same inbox and update HubSpot.

DONE WHEN

Test reply goes end to end in under 2 minutes.

EVIDENCE TO KEEP

Screenshot of the n8n workflow and a Slack message with a drafted reply.

Done by _____

Date _____

Approved by Management _____



9.3 Set up booking links

Meeting owner

Due 25 Sept

Setup

Tools: Cal.com or Calendly

A smooth booking step removes friction at the moment a prospect says yes.

1. One link per segment with round-robin across meeting owners.
2. Invites from @abilityglobal.io calendars; reminders 24h and 1h before.

DONE WHEN

Test booking works.

EVIDENCE TO KEEP

Screenshot of the booking page and a test confirmation email from an @abilityglobal.io calendar.

Done by _____

Date _____

Approved by Management _____



9.4 Install Claude skills and schedules

Claude

Ops lead

Due 29 Sept

Setup

Tools: Claude project

Skills and schedules let Claude do research, drafting and monitoring every day without manual prompts.

1. Skills: icp-scorer, lead-researcher, cold-copy, list-hygiene, reply-desk, meeting-brief, scope-builder, deliverability-watch.
2. Schedules: 07:00 health report, 08:00 lead batch, twice-daily reply digest, Monday review.

DONE WHEN

First scheduled report arrives.

EVIDENCE TO KEEP

Screenshot of the installed skills list and the first scheduled health report.

Done by _____

Date _____

Approved by Management _____



9.5 Dry run the reply desk

Reply desk

Due 2 Oct

Setup

Tools: Slack, PlusVibe

Practice before launch prevents missed or slow replies in week one.

1. Run 20 sample replies through the flow.
2. Practise approving within 1 hour and booking a meeting.

DONE WHEN

Desk hits 1-hour target on all samples.

EVIDENCE TO KEEP

Screenshot of the dry run log with response times.

Done by _____

Date _____

Approved by Management _____

10

Launch and ramp

Reach 1,008 emails a day with every KPI green.

After setup · 12 Oct to 2 Nov
5 steps☐ 10.1 Pass gate G2 on all inboxes

Ops lead Due 4 Oct Setup

Tools: PlusVibe inbox tests, mail-tester

Proves every inbox reaches the primary inbox before any prospect is contacted.

1. Send simple casual one-line emails from every inbox to seeds with PlusVibe on day 14 of warmup (4 Oct), repeat on day 21 (11 Oct) before the first cold email.
2. Confirm each domain still scores 10/10 on mail-tester.

DONE WHEN

90% or more primary inbox, no blocklists.

EVIDENCE TO KEEP

Screenshot of placement test results for both test days.

Done by _____

Date _____

Approved by Management _____

☐ 10.2 Ramp week 1: 8 per inbox (288 a day)

Ops lead Due 12 Oct After setup

Tools: PlusVibe

A slow start builds positive signals and exposes problems at low risk.

1. Inboxes reach 21+ days of warmup. Launch both campaigns at 8 per inbox. Watch bounce, replies and placement daily.

DONE WHEN

Week KPIs green.

EVIDENCE TO KEEP

Screenshot of the PlusVibe analytics for ramp week 1 with bounce and reply rates.

Done by _____

Date _____

Approved by Management _____

☐ 10.3 Ramp week 2: 15 per inbox (540 a day)

Ops lead Due 19 Oct After setup

Tools: PlusVibe

Volume grows only after the previous week proves healthy.

1. Add Banking ops and Talent segments.

DONE WHEN

Week KPIs green.

EVIDENCE TO KEEP

Screenshot of ramp week 2 analytics and the health report.

Done by _____

Date _____

Approved by Management _____



10.4 Ramp week 3: 22 per inbox (792 a day)

Ops lead

Due 26 Oct

After setup

Tools: PlusVibe

Continues the safe ramp while testing new variants.

1. Placement test on every new variant.

DONE WHEN

Week KPIs green.

EVIDENCE TO KEEP

Screenshot of ramp week 3 analytics and placement test results.

Done by _____

Date _____

Approved by Management _____



10.5 Ramp week 4: 28 per inbox (1,008 a day)

Ops lead

Management

Due 2 Nov

After setup

Tools: PlusVibe

Full volume is only safe once every KPI has held for three weeks.

1. Management confirms full volume. Add BizAi segment.

DONE WHEN

1,008 a day sustained for 5 business days.

EVIDENCE TO KEEP

Screenshot of ramp week 4 analytics showing about 1,008 sends a day and green KPIs.

Done by _____

Date _____

Approved by Management _____

11

Daily operations

The engine runs itself; people handle judgment.

Every business day from 12 Oct
4 steps

☐ 11.1 07:00 health check

Ops lead Claude Due 12 Oct After setup

Tools: Claude report, PlusVibe

Catching a problem in hours instead of days saves domains and the campaign.

1. Read the report. Apply pauses: bounce over 3% pauses inbox; placement under 70% sends domain to warmup; spam rate over 0.1% pauses domain; major blocklist retires domain.
2. Swap in reserve domains within 24 hours.

DONE WHEN

Actions logged by 09:00.

EVIDENCE TO KEEP

Screenshot of today's health report and the action log.

Done by _____

Date _____

Approved by Management _____

☐ 11.2 Upload the day's leads

Data operator Due 12 Oct After setup

Tools: Apollo, Claude + Apify, MillionVerifier, NeverBounce, PlusVibe

A steady flow of fresh, verified leads keeps the engine at volume without lowering quality.

1. About 385 new verified, scored leads.
2. Spot-check 5%.

DONE WHEN

Leads loaded before sending window.

EVIDENCE TO KEEP

Screenshot of today's upload in PlusVibe and spot-check notes.

Done by _____

Date _____

Approved by Management _____

☐ 11.3 Work the reply desk

Reply desk Due 12 Oct After setup

Tools: Slack, PlusVibe

Response speed is the biggest factor in converting interest into meetings.

1. Interested: approve under 1 hour. Questions: under 2 hours. Referrals: same day.
2. Unsubscribes: confirm suppression across all domains.

DONE WHEN

All replies handled within SLA.

EVIDENCE TO KEEP

Screenshot of the reply desk queue showing response times.

Done by _____

Date _____

Approved by Management _____



11.4 Follow-ups and nurture

Reply desk

Meeting owner

Due 12 Oct

After setup

Tools: PlusVibe, HubSpot

Most deals come from follow-up, not the first reply.

1. Interested but not booked: human follow-up day 2 and day 5, then weekly for 3 weeks.
2. Not now: 90-day nurture note.
3. Scores over 80: LinkedIn connection after email step 2.

DONE WHEN

No interested lead without a next step.

EVIDENCE TO KEEP

Screenshot of HubSpot showing interested leads each with a next step and date.

Done by

Date

Approved by Management

12

Meetings to clients

From yes to a scoped proposal in 48 hours.

Per meeting, from 12 Oct
6 steps

12.1 Confirm the meeting

Meeting owner

Due 14 Oct

After setup

Tools: Cal.com, Outlook

Moving the conversation to the main domain builds brand trust for the relationship.

1. Invite comes from the owner's @abilityglobal.io address. The conversation now lives on the main domain.

DONE WHEN

Invite accepted.

EVIDENCE TO KEEP

Screenshot of the accepted calendar invite from an @abilityglobal.io address.

Done by

Date

Approved by Management

12.2 Read the pre-meeting brief

Claude

Meeting owner

Due 14 Oct

After setup

Tools: Claude meeting-brief

Prepared calls feel tailored and qualify faster.

1. Company snapshot, trigger signal, email thread, likely pains, offer, 5 discovery questions.

DONE WHEN

Owner has read and added notes.

EVIDENCE TO KEEP

Screenshot of the brief with the owner's notes.

Done by

Date

Approved by Management

12.3 Run and record the call

Meeting owner

Due 15 Oct

After setup

Tools: Teams or Fireflies

A transcript captures needs accurately for the scope and proposal.

1. Ask consent to record. Cover needs, budget, timeline, decision makers.

DONE WHEN

Transcript saved.

EVIDENCE TO KEEP

Screenshot of the saved transcript (first page only).

Done by

Date

Approved by Management



12.4 Send same-day follow-up

Meeting owner

Claude

Due 15 Oct

After setup

Tools: Claude

Same-day follow-up keeps momentum and shows how Ability works.

1. Claude drafts summary and follow-up email from the transcript.
2. Owner edits and sends.

DONE WHEN

Follow-up sent same day.

EVIDENCE TO KEEP

Screenshot of the sent follow-up email.

Done by

Date

Approved by Management



12.5 Build and review the scope

Claude

Solution lead

Due 17 Oct

After setup

Tools: Claude scope-builder

A reviewed scope avoids overpromising and speeds the proposal.

1. Claude drafts objectives, team shape, phases, assumptions, open questions.
2. Solution lead reviews and corrects.

DONE WHEN

Scope approved.

EVIDENCE TO KEEP

Screenshot of the approved scope document.

Done by

Date

Approved by Management



12.6 Send proposal and update CRM

Meeting owner

Management

Due 20 Oct

After setup

Tools: Claude, HubSpot

A fast, well-formatted proposal and clean CRM stages move the deal and make the pipeline visible.

1. Proposal in Ability format with PDF copy.
2. Stages: Replied, Meeting booked, Met, Scoping, Proposal sent, Negotiation, Won or Lost. Every open deal has a next step and date.

DONE WHEN

Proposal sent, deal stage updated.

EVIDENCE TO KEEP

Screenshot of the sent proposal email and the deal stage in HubSpot.

Done by

Date

Approved by Management

13

Review and scale

Keep improving, then grow safely.

Weekly and monthly
3 steps☐ 13.1 Monday campaign review

Ops lead Management Claude Due 19 Oct After setup

Tools: Claude report, PlusVibe, HubSpot

Weekly review turns data into better copy, targeting and pipeline.

1. Winning and losing variants, segment reply rates, meetings, pipeline.
2. Rewrite the weakest variant; DNS and blocklist sweep of all 22 domains.

DONE WHEN

Actions agreed and assigned.

EVIDENCE TO KEEP

Screenshot of the review notes with actions and owners.

Done by _____

Date _____

Approved by Management _____

☐ 13.2 Monthly refresh

Management Data operator Ops lead Due 2 Nov After setup

Tools: Claude

Markets and data drift; monthly refresh keeps targeting and domains healthy.

1. Refresh ICP from won and lost deals.
2. Retire or rest weak domains; rebalance Microsoft and Google pools from real MX data.

DONE WHEN

Updated segment sheet and domain plan.

EVIDENCE TO KEEP

Screenshot of the updated segment sheet and domain plan.

Done by _____

Date _____

Approved by Management _____

☐ 13.3 Scale decision

Management Due 7 Dec After setup

Tools: KPI dashboard

Scaling only on proven KPIs protects the engine we built.

1. If KPIs held for 4 weeks: add 10 domains and 20 inboxes, warm in December, reach 1,500 a day in January.

DONE WHEN

Go or wait decision recorded.

EVIDENCE TO KEEP

Screenshot of the KPI dashboard and the recorded decision.

Done by _____

Date _____

Approved by Management _____

Setup sign-off

Complete on day 20 (6 Oct 2026) before any cold sending is scheduled.

CHECK	RESULT	CHECKED BY
abilityglobal.io: SPF, DKIM and DMARC pass, mail-tester 10/10		
DMARC at p=reject with clean reports (Management approval)		
22 domains and 44 inboxes pass gate G1 and are warming		
Gate G2 placement passed on all inboxes (PlusVibe, Mailscale, mail-tester)		
Gate G3 copy placement passed on launch campaigns		
8,000 verified, scored leads in the lead bank (MillionVerifier, NeverBounce)		
Global suppression list loaded		
Reply flow, booking links and Claude skills tested in a dry run		
Bulk lane on news subdomain authenticated with consented lists		
All 11 milestone evidence complete in the Milestone Tracker		